



*INSTITUTE of
MUSEUM
and LIBRARY
SERVICES*

2001
Field
Reviewer
Handbook

General
Operating
Support

*For information, call
IMLS: (202) 606-8539
or e-mail: dlukash@imls.gov*

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The GOS Review Process

Thank you for offering to serve as a General Operating Support field reviewer. We have selected you to review this year's applications because of your expertise in professional museum operations.

The staff at IMLS has prepared this handbook specifically for field reviewers. It will provide you with the technical information you need. Please use it in tandem with this year's *General Operating Support Grant Application and Guidelines*. Even if you are an experienced reviewer, you'll need to refresh your memory and note any changes.

WHAT IS GENERAL OPERATING SUPPORT?

General Operating Support provides Federal grants to museums through an annual, competitive process. In the GOS program:

- Applications are evaluated by peers;
- Evaluations are based on the application's strength in proving that the museum—has knowledge of and adheres to generally accepted practices of museum operations; and—makes the best use of its resources to meet its mission.

The flow chart on the following page outlines the GOS process along three tracks: the application process (the museum), the administrative process (IMLS staff) and the review process (field review and panel review).

By reading the chart along with the descriptions below, you can see how your job as field reviewer interconnects with the other parts of the process.

THE GOS PROCESS

- 1) Applicants receive the grant application booklet; they complete the application form.
- 2) IMLS identifies a pool of available field reviewers.
- 3) IMLS receives the applications and checks them for completeness.

HOW ARE APPLICATIONS ASSIGNED TO FIELD REVIEW?

- 4) After being sorted by budget size and discipline, each application is matched to four field reviewers.

We assigned you applications that matched (as closely as possible) the discipline and budget size that you indicated you are qualified to review.

Questions about any information in this booklet? Contact the IMLS Program Office at (202) 606-8539 between 8:30 a.m. and 5:00 p.m. Eastern time, Monday through Friday.

■ NOV ■ DEC ■ JAN ■ FEB ■ MAR ■ APR ■ MAY ■ JUN ■ JUL ■ AUG ■ SEP

APPLICANT

complete application

submit application

receive notification & comments

I M L S

mail guidelines

solicit reviewers

match applications with reviewers

identify problems; panel recommends solutions

perform accounting review

make awards

REVIEWER

determine availability to review

review applications (see enclosed schedule)

receive feedback on performance

Applications are grouped and assigned to reviewers according to the disciplines listed in the *General Operating Support Application and Guidelines* and by budget categories. The disciplines are:

- | | |
|-------------------------------------|--------------------------------------|
| 01. Aquarium | 08. Natural History/
Anthropology |
| 02. Arboretum/
Botanical Gardens | 09. Nature Center |
| 03. Art | 10. Planetarium |
| 04. Children's/Junior | 11. Science/Technology |
| 05. General | 12. Zoo |
| 06. Historic House/Site | 13. Specialized |
| 07. History | |

We determined each applicant's budget category from the non-Federal operating income on line 23 of the application *Face Sheet*. The budget categories for each year's competition are based on the actual operating budgets of that year's applicant pool. As the pool of applicants differs each year, the breaks in the budget categories for each year will vary as well. Each discipline is assigned its own set of budget categories—up to seven categories for any given discipline.

The number of budget categories for each discipline will depend on the number of applicants in each discipline and the range of their budgets. We may ask you to review a museum with a budget size that is either smaller or larger than those with which you are most experienced; in such a case, you should pay close attention to the museum's resources. If there are too few reviewers for a given discipline, we may ask you to review a museum whose discipline is not your first choice.

- 5) Field reviewers receive the applications, evaluate them and return their review sheets to IMLS.

WHAT DOES IMLS DO WITH THE FIELD REVIEW SHEETS?

- 6) IMLS processes comments and scores.

IMLS staff reads every review sheet and comment submitted by each reviewer. We look for comments that potentially do not follow IMLS policy (see "Poor Comments" on page 20). IMLS then convenes a panel of experienced GOS reviewers in Washington to review the potential problems identified by IMLS staff.

Reviewers' scores are mathematically standardized to mitigate the effect of those who always use low or high scores. A single, standardized score is produced from *each* reviewer for *each* application. (See step 8.)

Using a statistical program, IMLS identifies any set of scores submitted by a reviewer that are not in statistical agreement with the other three reviewers. This process analyzes scores on a reviewer basis, not application by application. (Disregarded scores are not averaged with the other three when producing an application's average standardized score.)

WHAT IS THE ROLE OF THE GOS REVIEW PANEL?

- 7) The GOS Peer Review Panel meets to resolve problematic reviews.

The GOS review panel, made up of museum professionals, meets in Washington, DC each June after the field review period. IMLS asks superior GOS field reviewers to serve on the panel. Panelists represent a cross-section of museum disciplines, budget sizes, geographic regions and governing authorities.

We ask the panelists to look at field review sheets that our staff identified as problematic. (See step 6.) Most GOS field reviewers are extremely conscientious and do an excellent job. If, however, a field reviewer has clearly been biased or unfair to an applicant, panelists may recommend that a field reviewer's score(s) be changed or that a particular review sheet be disregarded.

IMLS asks panel members about issues pertinent to each year's competition and about improving the GOS program. Panelists monitor the overall statistical distribution of awards across budget sizes, disciplines and geographic regions.

Following the field and panel review, IMLS staff report on the year's competition to the National Museum Services Board (the IMLS Presidentially-appointed advisory board for museum programs).

HOW DOES IMLS RANK THE APPLICATIONS?

- 8) Using a generally accepted mathematical formula—standard deviation—IMLS standardizes the scores and ranks all applications.

The final standardized scores from the field reviewers for each application are averaged to produce one average standardized score. All applications are ranked based on the standardized average, from highest to lowest score. Awards are made on the basis of this ranking.

- 9) IMLS reviews the financial/accounting information of each potential grantee.
- 10) IMLS awards the GOS grants.

The Director of IMLS announces the awards in early September. At that time, IMLS notifies all applicants by mail whether or not they have received an award. We also send a list of grantees to all participating reviewers.

With their notification, all applicants receive the review sheets that their field reviewers completed (excluding any unsatisfactory review sheets that IMLS eliminated). Museum staff can benefit tremendously from thoughtful, constructive comments.

HOW DO APPLICANTS USE YOUR REVIEW SHEETS?

Successful applicants point to good scores and positive comments as a stamp of approval for their institution's operations. Museum administrators report that receiving a GOS award enhances fund-raising success with private foundations or state and local sources. Museum staff may quote directly from their GOS review sheets when trying to raise funds.

Other applicants, after reading constructive feedback provided by their peers, discover ways to strengthen their museum's activities, plans or policies. In this very direct way, for both successful and unsuccessful GOS applicants, the peer review process offers a readily available tool for professional assessment. It also helps to promote the development and refinement of professional practices in museums.

CAN YOU GET FEEDBACK ON YOUR PERFORMANCE?

11) Field reviewers will receive information about their performance from IMLS.

IMLS will mail you feedback on your performance as a field reviewer regarding your strengths and weaknesses. You will receive this information in September. Upon receiving your evaluation we invite you to call the IMLS Office of Museum Services to discuss your evaluation.

We greatly appreciate the tremendous amount of time and effort you have committed to being a reviewer. By participating in the peer review process, you are making a significant contribution to the IMLS' General Operating Support program and are providing an invaluable service to the entire museum community. Thank you!

Questions about any information in this booklet? Contact the IMLS Program Office at (202) 606-8539 between 8:30 a.m. and 5:00 p.m. Eastern time, Monday through Friday.

II. Application Review Instructions

This section of the handbook contains detailed information on how to review a GOS application.

IMPORTANT! Experienced reviewers estimate that it takes at least two hours to evaluate one application (for all of your assigned applications, a total of 30-40 hours over a four-week period). If you are a first-time GOS reviewer, you may need even more time.

We recommend the step-by-step reviewing process outlined below.

CHECK SHIPPING BOX

- 1) If you haven't already done so, check your shipping box! Call us immediately if any of these items are missing:
 - GOS applications
 - Instructional materials (in addition to this handbook)
 - Processing materials
 - Reviewer ID labels
 - Reviewer questionnaire

- 2) Read through your list of applications to see if there are any potential conflicts of interest. You have a conflict if:
 - You, your spouse, or minor child are involved with the applicant institution, or in the project described in the application, as a paid consultant or through other financial involvement.
 - The application is presented on behalf of an institution with which you, your spouse or minor child are negotiating future employment.
 - Through prior association as an employee or officer, you have gained knowledge of the applicant which could preclude objective review of its application. (Past employment does not by itself disqualify you, as long as you can review objectively.)

CONFLICT OF INTEREST

Other conflicts may arise if you have served as a MAP consultant or member of an accreditation team for an applicant institution or have recently applied for a position at an applicant institution. We rely on you to determine if you can objectively review an application. You should *never* apply prior knowledge of an institution to your reading of a GOS application.

Once you have reviewed an application, you should never represent the applicant (concerning the application, or any grant that may result from it) in dealings with the Institute of Museum and Library Services or another Federal agency.

- 3) Please read and sign the Conflict of Interest form and return it with your review sheets.

Questions about any information in this booklet? Contact the IMLS Program Office at (202) 606-8539 between 8:30 a.m. and 5:00 p.m. Eastern time, Monday through Friday.

**APPLICATION
COMPLETENESS**

- 4) Check your applications to make sure that all required information is included. We check the original application only. We do not check every page of each reviewer copy for completeness. *If any application appears to be incomplete, call us immediately.* We will forward the missing material to you. DO NOT penalize the applicant for information missing in your copy of the application.

**READ
APPLICATIONS**

- 5) Read your applications to develop a feel for the range of responses. Before reading your applications, reread the narrative questions and guidelines on pages 4.1-4.10 of the *General Operating Support Grant Application and Guidelines* booklet. The listed items represent the types of information you should look for in the applicant's responses and should serve as guideposts for your review.

**EVALUATE
APPLICATIONS**

- 6) Read your applications again. Take notes as you read. Draft your comments for each of the nine (or ten) narrative responses.
- Use your professional knowledge and experience to objectively assess the information
 - you MAY NOT base your evaluation on any prior knowledge of an institution
 - your information should only come from the application and its attachment
 - if you question the accuracy of any information, call IMLS to discuss it; DO NOT question the applicant's honesty or integrity in your written comments
 - Consider how well the museum is using its resources to fulfill its stated mission
 - recognize the range of budget sizes in your group of applications and be sure your comments are appropriate for those resources.
 - Assess the degree to which the applicant follows generally accepted professional museum practices
 - Address the applicant's *entire* response to each narrative question
 - Consider an applicant's strengths *and* weaknesses
 - acknowledge and compliment strengths
 - describe weaknesses and offer practical suggestions for strengthening operations
 - Address the applicant—your professional peer
 - Be sensitive to the effect of your comments
 - unprofessional comments offend applicants
 - unprofessional comments undermine applicants' confidence in the review process and in you as a peer
 - constructive and reasonable remarks have a positive effect
 - Remember that successful *and* unsuccessful applicants use your comments to improve their museum operations and future applications
 - comments should be concise, easy to read and understand
 - comments should be specific to the individual applicant; vague, general statements are not helpful
 - comments should *analyze* the narrative section of the application; summarizing or paraphrasing the applicant's own words will not help the applicant
 - comments should address both positive aspects as well as areas for improvement

**SAMPLE
COMMENTS**

See page 17 for sample review comments.

- 7) Assign preliminary scores to each narrative section.
Use a scale of 1 through 7
1 =lowest; 7 = highest (see scoring definitions on page 24)

We suggest that you use the *Start With 4* method to assign scores. If all field reviewers adopt this same approach, GOS applicants will see greater consistency in the use of our scoring definitions. If you have questions please contact us at **(202) 606-8539**.

IMPORTANT! To help applicants understand and benefit from your reviews, make sure that your scores accurately reflect your written comments.

**ASSIGN
SCORES:
START WITH 4**

To *Start With 4*

- Finish drafting your narrative comments
 - Make sure that your comments accurately reflect your opinions
- **4 = average (follows generally accepted practices)**
 - Consider a score of 4 to represent the *average* level of museum operations—think of 4 as your starting point.
- Adjust up or down from 4 according to your written comments. If the museum’s operations and services seem
 - adequate or average—i.e., neither particularly strong nor particularly weak, but somewhere in the middle—retain the 4;
 - a little better than average, assign a 5;
 - much better than average, assign a 6;
 - minimally acceptable, drop down from a 4 to a 3;
 - inadequate, choose a 2.
 - Reserve a score of 1 for what appear to be *extremely* poor operations and services and a score of 7 for *exceptionally* good operations and services.
- Be fair and objective
 - Applications are not ranked by the scores you assign but by the relative performance of each application compared to all others. Awarding only high scores will not benefit those applicants; awarding only low scores will not penalize those applicants.

ELIGIBILITY

We determine an institution’s eligibility for GOS funds by reading the responses on grant application page 6.11 (Eligibility Requirements). You may read about eligibility requirements on pages 1.5-1.7 of the *Grant Application and Guidelines* booklet. If you have any doubts about an applicant’s eligibility, please contact us immediately. **DO NOT** under any circumstances contact an applicant directly.

**TYPESIZE
AND
FORMAT**

The application does not provide a form for the narrative part of the application. We allow applicants to write 15 pages of narrative if they are a collections holding institution, and 14 pages if non-collections holding. A minimum one-quarter inch margin should be left on the sides and bottom of the page.

IMLS staff have checked each application to ensure that the narrative limitations have been met. If you have any doubts about an application's conforming to the page limitations, please contact us immediately. **DO NOT** penalize an applicant for violations; we will assign penalties as needed.

We also require applicants to use a typesize that measures no more than six lines per vertical inch and to use standard spacing between letters.

Please use your common sense when judging typesize or page format. We developed these rules primarily to help reviewers. You don't need to actually measure the type; if you can read the text without eye strain, it probably meets our specifications.

If you do see a problem, however,

- Call IMLS
- Review the application. **DO NOT** lower an applicant's score because of reduced type or reformatting.
- **DO NOT** note the problem on your review sheet itself, but rather attach a separate note for IMLS only.

We will assign penalties as needed.

**REVIEW
YOUR WORK**

- 8) Review your draft comments and preliminary scores.
- Adjust them as necessary; scores should support comments and comments should justify scores.

**WRITE
SPECIFIC
COMMENTS
AND
ASSIGN
SCORES**

- 9) **Type** your final comments and scores (for narrative sections I—X) on your review sheets. We suggest you recreate both sections of the GOS Application Review Sheet on a computer, or copy the sheet at the back of this handbook, one for each application you are reviewing. Retain the same general format and spacing as on our original form. You do *not* need to recreate the lined boxes.
- Use one review sheet for each application.
 - Handwritten comments are difficult or impossible to read—use a typewriter or computer printer.
 - Make use of all the space on the review sheet—give the applicant as full a critique as the space allows.
 - Type legibly and provide a comment for each narrative section. We will call you to request missing or illegible scores or comments.

**WRITE
GENERAL
COMMENTS**

- 10) Type any general comments you wish to make about the application in section II of the review sheet. Although this section is not scored and does not affect the applicant's funding status, it provides an opportunity for you to
- communicate overall impressions to the applicant; and
 - offer general comments on improving the application.

Please address your remarks directly to the applicant museum; do not repeat or contradict specific statements you made in section I of your review sheet (step 9 above).

- 11) Calculate the average score for each application as follows.
 - Total your scores for one application.
 - Divide the total by the number of sections scored (for non-collecting institutions, divide by 9; for collecting institutions, divide by 10). Carry to one decimal point only. (4.3, 6.0, etc.). Do not round up nor down.
 - Enter your result on the *Average Score* line in section II of the review sheet.

**SIGN IMLS
COPY**

- 12) Sign your name and attach a reviewer label to each IMLS copy of your review sheets in the spaces indicated (at the bottom of section II). You do not have to recreate the signature block as shown on the sample in the back. Your signature means you adhered to the review procedures.

**COPY
REVIEW
SHEETS**

- 13) Produce three copies of each review sheet:
 - *Applicant copy* with museum name and log number (do not include your name on this copy).
 - *IMLS copy* with museum name and log number at the top of section I and your signature and reviewer ID label at the bottom of section II.
 - *Reviewer copy*—same as IMLS copy.

**RETURN
MATERIALS
TO IMLS**

- 14) Return the applicant copy and the IMLS copy of your review sheets to IMLS with your completed reviewer questionnaire. (See page 16 for mailing instructions.)
 - MEET THE IMLS RECEIPT DEADLINE! -April 18, 2001
 - Don't forget to fill out your reviewer questionnaire (you may send it a few days later)
 - Return your signed Conflict of Interest form

**KEEP
COPIES
UNTIL
OCTOBER 1**

- 15) Keep your applications and your review sheets until October 1 (in case of loss in shipment or questions from IMLS staff).
 - Maintain confidentiality of all applications that you review.
 - After October 1, destroy the applications and review sheets (you may keep optional attachments such as catalogues or brochures).

You will have four weeks to complete all of the steps described above. We have provided you with a schedule of completion (see page 25) to help you pace yourself through the assigned tasks. Please complete your work on time! The entire process depends on promptness from our field reviewers.

Additional Details for Reviewers

Although we ask you to provide comments and scores that are specific to each of the ten (or nine) narrative sections, you must take the entire General Operating Support application into account when evaluating any individual section. The following issues require your special consideration: understanding them will help you synthesize the information provided in each application.

TWO FUNDAMENTAL QUESTIONS THAT YOU NEED TO ASK YOURSELF WHEN REVIEWING:

- 1) To what extent does the museum adhere to generally accepted practices of museum operations in attaining its mission?
- 2) To what extent does the museum use its available resources in attaining its mission?

To answer the first question, you must draw primarily upon your own professional knowledge and experience. Different practices will apply to different types of museums.

For example, a museum that is close to a major population center usually has an easier time attracting visitors, volunteers and financial support than a museum located in a remote area. A museum in a subtropical climate will have different conservation needs and problems than a museum in the desert. Always think about what an institution has and can use to its advantage when evaluating it. Those elements that are beyond a museum's ability to change should not be held against that museum in your scores or comments.

To decide if a museum is making the best possible use of its available resources, you first need to determine what those resources are. The list might include:

- assets (cash, securities, accounts/grants receivable, endowments, land, buildings, equipment, etc.); which ones represent *available* resources? —i.e., are they part of the museum's unrestricted funds or restricted funds?
- collections
- staff and board
- audience
- community support

Ask yourself if, given the *available* resources, the museum is doing all it can to achieve its stated mission. Write your comments and choose your scores accordingly.

**AUDIENCE/
ATTENDANCE
NUMBERS**

This year IMLS has revised the attendance numbers presented in Section 1 of the narrative. Each museum explains how they arrived at the numbers for each of the three attendance categories: onsite, offsite, and electronic. The purpose of your review of these figures is to evaluate how the programs and audience attendance to the museum's programs reflect the mission and proper use of resources.

TECHNOLOGY

This year IMLS added questions about the use of technology in the narrative sections titled Audience, Exhibitions, Management and Care, Education, Physical Facilities/Safety and Security, and Long Range Plan. Consider the museum's use of technology for its internal operations and in the services it offers to the public. Technology in this context can include software for business operations, software applications for managing collections, computers, and related hardware, e-mail, development and use of an intranet, digitization projects, a Web site. This list is not exhaustive. Keep in mind that there is a wide range of technology equipment, applications and skills currently available within museums, from very limited technology to sophisticated, integrated systems and services. The focus in this review process is on what a particular museum has implemented, not what it could or should

have. Does the museum effectively use the technologies available to it? What impact does use of technology have on its operations and services? For example, if the museum has a Web site, is it used for directory information only, or does it open access of the museum's collections and services to a virtual audience?

USE OF GOS FUNDS

Your role as a reviewer does NOT include evaluating the appropriateness of the museum's planned use of GOS grant funds. Your comments and scores in Section X. Long Range Plans should only be based on the applicant's narrative regarding long range plans. IMLS staff will review the use of GOS funds for all applications that are scored in the funding range.

MUSEUM GOVERNING STRUCTURES

Museums applying for GOS funds have various types of governing structures, all of which may not be equally familiar to you. The three most common types that we see are:

- private (not-for-profit)
- university (private or public)
- public (government-operated)

In Section VIII of the grant application, you will find information about that institution's governing authority and management structure. Following are a few examples of different governing structures.

EXAMPLES:

- A museum that is part of a state government has a politically appointed board that is not representative of the museum's constituency.
- A university museum, which is also part of a governmental unit, is restricted in its fund-raising efforts by larger development campaigns within the university.
- A county museum is required to operate on a zero-based accounting system (they may not show either a deficit or an excess on their books at the end of the fiscal year). Each year the county authority retains any surplus or covers any expenses.
- A private museum whose board members are selected and serve according to its articles of incorporation (or by-laws).

The type of governing structure will affect operations and services; each has benefits and restrictions.

NON- COLLECTING MUSEUMS

Non-collecting institutions do not answer Section II Collections. They are exempt if they can answer "no" to both questions at the top of page 4.3 of the *General Operating Support Grant Application and Guidelines* booklet. In addition, non-collecting institutions must answer Section IV. B. Management and Care/Exhibits; collecting institutions will answer Section IV.A.

You must provide us with comments and scores for only *nine* narrative sections for non-collecting museums. For all other applicants, you must provide ten scores and accompanying comments.

**FINANCIAL
INFORMATION**
(DETAILS ON
PAGE 14)

You should examine the financial information to enhance your understanding of the institution. How a museum handles its finances is one measure of how well it adheres to generally accepted practices of museum operations. You should also evaluate the museum's services and operations relative to the level of financial support it receives.

Applicants are required to complete *Financial Form C, Valuing Non-Cash Contributions* and to enter this information on Financial Form A.

During your review, carefully read each application's narrative Sections VIII. Governance and Management/Financial Management and IX. Support, as well as accompanying financial forms (IMLS Forms A, B and C and the museum's audit). On the following pages, you will find a description of the IMLS forms and suggested ways to use them.

Questions about any information in this booklet? Contact the IMLS Program Office at (202) 606-8539 between 8:30 a.m. and 5:30 p.m. Eastern time, Monday through Friday.

COMPONENTS OF IMLS FINANCIAL STATEMENTS

<p>FORM A* & FORM B** <i>Statement of Activity</i></p> <p><i>Program Revenues and Other Support</i></p> <p><i>Expenses</i></p>	<p>Program Revenues, Other Support and Expenses throughout the same year. Some museums may have only unrestricted entries.</p> <p>Sources of income. Bottom line equals non-Federal operating income.</p> <p>Cost breakdown by type of expense (e.g., salaries, materials, utilities). Change in Net Assets from beginning of year to end of year.</p>
<p>FORM C <i>value of non-cash contributions</i></p>	<p>Contributed Services, Materials and Rental Allowances. Must be added to operating income on Form A. A dollar figure for non-cash contributions may be included on Form B, but no paper documentation is required.</p>

* most recently completed fiscal year

** 2nd most recently completed fiscal year

COMPONENTS OF AUDITED FINANCIAL STATEMENTS*

<p>ACCOUNTANT'S REPORT <i>(Opinion Letter)</i></p>	<p>Gives an opinion as to the fair representation of the financial position of the museum; assesses the accounting principles used by the museum.</p>
<p>FINANCIAL STATEMENTS <i>Balance Sheet</i></p> <p><i>Statement of Activity</i></p> <p><i>Statement of Revenue & Support</i></p> <p><i>Statement of Activity</i></p>	<p>Assets, Liabilities and Fund Balances as of end of fiscal year.</p> <p>Revenue, Support and Expenses throughout the fiscal year.</p> <p>Shows sources of income.</p> <p>Cost breakdown of programs and activities. May be separated only by types of expense (e.g., payroll, utilities, printing) or further broken down by function (e.g., collections, education, administration).</p>
<p>STATEMENT OF CHANGES IN FINANCIAL POSITION</p>	<p>Summary of financial resources in an accounting period and how those resources were used.</p>
<p>NOTES TO FINANCIAL STATEMENTS</p>	<p>Explains organization of museum and significant policies. Gives greater detail for better understanding of specific accounts. Explains significant transactions and events.</p>

* Audited financial statements are required unless the museum is exempt according to IMLS regulations or is part of a larger organization and, therefore is not separately audited.

**REVIEW
THE
FINANCIAL
FORMS**

Following are some suggested ways to use the financial forms and audits.

Use financial figures to:

- identify sources of income
- recognize the whole picture of a museum's resources
- determine relative levels of income sources
- correlate to narrative description of operations

Compare FORMS A and B in order to:

- identify financial stability and change
- reflect a potential pattern of deficit operations

Compare FORMS A and B with audited statements to:

- verify bottom line figures
- obtain additional information on cost breakdowns
- see more detailed explanation of museum operations in "Notes"

Use FORM C to:

- assess institution's success in attracting support
- correlate non-cash contributions listed on the form with narrative description of community support

**EXAMPLES OF COMPARING FINANCIAL FORMS WITH
NARRATIVE:**

NARRATIVE	FINANCIAL FIGURES
Long-Range Plans	Does the ratio of expenses reflect the plans of the institution in such areas as collections, interpretation, research, etc.?
Audience	Do admission revenues fit with stated attendance levels? (attendance may include free programs)
Support	Do in-kind and corporate support numbers reflect level of support noted in text?
Administration	Are excesses/deficits explained in text? Are they planned? (e.g., depreciation may be used as a budget-planning tool to build cash reserve to replace equipment)
Statement of Purpose	Does the ratio of expenses reflect the mission of the institution in such areas as collections, interpretation, research, etc.?

Following the field review, IMLS staff and consulting accountants examine the financial forms and audited financial statements of all applications that are recommended for funding. This process ensures that all applicants receive the grant amount for which they are eligible.

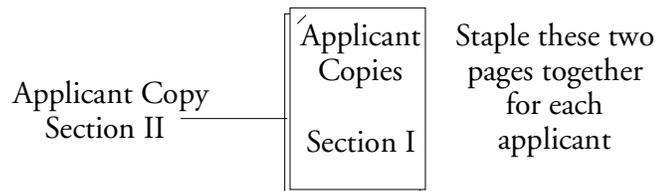
III. Assembling Your Review Sheets for Mailing

Assemble your review sheets for mailing to IMLS as follows:

- 1) Separate your review sheets into three piles.



- 2) Put each pile in IG-number order (IG-1_____).
- 3) Working with the *Applicant Copies* only, staple together section I (narrative scores and comments) and section II (general comments) of each applicant's review sheets.



- 4) Repeat Step 3 with all *IMLS Copies*.
- 5) Repeat Step 3 with all *Reviewer Copies*. (Remember to keep these until October 1 and then discard.)

You should now have three piles of review sheets labeled *Applicant*, *IMLS* and *Reviewer*. Each pile should be in IG-number order with sections I and II stapled together for each museum.

- 6) Mail the *Applicant* and *IMLS* copies in the return envelope provided.

or

Mail to: IMLS
1100 Pennsylvania Ave. NW Room 609
Washington, DC 20506

Thank you!

Remember to call IMLS if you have any questions.

IMLS Program Office:
(202) 606-8539

Sample Comments

The next few pages contain comments from field reviewers. Some are substantive, well-balanced and tactful—these are labelled “good” comments. Others are sarcastic, insensitive or otherwise unhelpful—these are labelled “poor” comments.

You may not understand the reviewer’s intentions in some cases since all of the comments have been taken out of context. Remember that these are samples only. Feel free to use the good ones as models when preparing your own but do not copy or paraphrase our samples. Each application is unique and deserves its own unique comments.

Some of the characteristics that are part of all good comments include:

- reference generally accepted practices
- acknowledges the resources of the museum
- recognizes positive aspects of their narrative
- addresses areas for improvement (i.e. why applicant did not get a higher score)
- remarks are presented in a constructive manner
- comments reflect professionalism of the reviewer
- comments speak to fellow museum professionals, not IMLS staff

In short, write comments you would want to receive back.

GOOD COMMENTS

The two review sheets found on the next two pages are actual review sheets completed by reviewers from the 2000 GOS competition. We have deleted specific museum references for confidentiality purposes.

We feel these comments presented on the following two review sheets are reflective of the quality of information, tone, and neatness that we expect of all review sheets. These sheets are not necessarily presented for the professional opinions they reflect, but more for the professional manner in which they are expressed.

We hope that this will give an idea of the expectation level we feel that most applicants have of the reviewer.

Section I: GOS APPLICATION REVIEW SHEET

APPLICANT:	LOG NUMBER:	SCORE
<p>I. AUDIENCE: Location within vacation corridor a plus, although the beach crowd must present some challenges. Strong, extensive publicity program reflects knowledge of tourist routes through area. Would like to know more about your home community. Bravo on making solid progress with handicapped-accessible strategies. MAP III is also a very positive step forward. Why the reduction in some services for 1999?</p>		5
<p>II. COLLECTIONS: Object categories clearly defined and strongly focused on building uses. Your acquisition needs seem to be well covered here. The assemblage of structures on the site raises some questions, since many date well beyond your stated period of focus. You could strengthen your response with further information on how and why these structures were selected – what strategies were used for prioritizing acquisitions?</p>		4
<p>III. EXHIBITIONS: Basic strategy is reasonable given staff limits and nicely encourages audience interaction with site features. Would like some clarification regarding how artifact collections are used in exhibit development process – are these items mainly from a hands-on education collection? Some organized audience input in the development process might be useful at this stage. What works and what doesn't – from their point of view?</p>		5
<p>IV. MANAGEMENT & CARE: Nice to see that a collections policy has been in place since 1985, but more specific information about policy development, content, and implementation would strengthen entry. Role of the Museum Committee is unclear – do they make recommendations regarding acquisitions or artifact care? Your collection and structures are clearly well-utilized by trades groups (blacksmiths, engineers, etc.), but significance to other populations in local community is not so clear.</p>		3
<p>V. EDUCATION: Your school programs are clearly a high priority and an institutional strength. Your "hands-on" philosophy should serve you well as further programs are developed. Planning process seems sound, but role of Board committee is again somewhat unclear. It sounds as if a very small staff is spread extremely thin. Perhaps adding some active craftspeople to the planning process would promote more balance.</p>		5
<p>VI. PHYSICAL FACILITIES / SAFETY & SECURITY: You use your physical resources to great advantage and the new Visitor Center is a significant milestone. While the lack of an organized disaster plan is understandable, your account of security procedures seems rather casual. While staff knowledge is certainly an invaluable asset, some written record regarding chain of command and area support agencies is recommended. The written record ensures continuity; perhaps an ad hoc Board committee could help here?</p>		4
<p>VII. STAFF: The small staff is clearly hard working and their community involvement is a great asset. Your entry could use more specifics regarding staff background, evaluation procedures, and insitutional support for ongoing staff development. The Personnel Manual is another area where perhaps an experienced Board member could help balance the work load by compiling a written record of the policies, leaving implementation procedures for staff to record. The covered dish luncheon is a nice gesture, but at some point long term growth will hinge on bringing current staff salaries to market level and funding a workable means to expand personnel.</p>		4
<p>VIII. GOVERNANCE & MANAGEMENT / FINANCIAL MANAGEMENT: Basic governance structure is adequate and orientation practices are quite professional. The continuing effort to keep past Presidents informed about the site is a wise move. While the range of Board Committees is sound, I do not get a clear picture of their actual function. Do they set policy or are they working groups? Budgeting and fiscal procedures are sufficient, but it seems as if the Finance Committee should be more involved with basic budget development.</p>		4
<p>IX. SUPPORT: obviously owes a great debt to its loyal volunteer corps. I hope that their contributions are actively recognized. Financial support is clearly a challenge, which makes your Visitor Center project all the more impressive. Nice job with Gift Shop revenues. Perhaps there is some potential in taking artisan products off-site and selling them in other venues. Your technology/industrial focus should lend itself to specialized foundation and corporate support from groups beyond the area.</p>		5
<p>X. LONG RANGE PLANS: Consistent revision of plans is a positive sign. The four target areas are logical selections but your account is more of a summary than an organized plan. A great deal more information is needed here. What are your prioritized areas for improvement and what strategies and timetables have been developed to encourage the realization of those goals?</p>		3

Section I: GOS Application Review Sheet

APPLICANT

LOG NUMBER

I. AUDIENCE

4

You're doing a good job of reaching out to different audiences, working with community groups, etc. I don't quite understand the reference to being a "hub" for larger cities. More specific demographics about your area, and information about tourists – where do they come from, why do they come, etc. would be useful, as would the specific figures for the last two years requested in the question. This is most effectively done by using a chart.

II. COLLECTIONS:

4

Collections seem to support your mission. A more general description of the interpretation of the house, and clear explanation of the second floor's role as, apparently, gallery space, would be more useful than the detailed description of each room. You did not provide an overview of the numbers and types of collections, as requested in the question. Keeping ice in the icebox, while providing a nice bit of authenticity, is a questionable conservation practice. Good to see that you are addressing the lack of Hispanic collections.

III. EXHIBITIONS:

4

Interesting-sounding exhibits, but it is not apparent if there is a clear concept running through the process. It would help to know who is on the committee, what their criteria are for determining the need for a particular exhibit. Input and advice from scholars and specialists in related fields can be very helpful, and you do not mention any consideration given to security and conservation of objects in planning and mounting exhibitions.

IV. MANAGEMENT & CARE:

2

No mention of a board-approved, written collections policy to spell out conditions for accessioning, deaccessioning, staff and board responsibilities for accepting donations, standards for record-keeping, storage, etc. It would help to know how you inventory and catalog the collection, and ensure that house repairs are done in an historically appropriate manner. There should be guidance from a knowledgeable historic architectural consultant. Lack of a clear-cut policies and procedures is a major problem.

V. EDUCATION:

3

You seem to be trying to match your programs with your audience, but a bit more detail would have been useful. For example, to what extent you work with teachers to develop programs that fit their curriculum. More specificity here, and in describing adult programs, would strengthen your application. For historical societies with a broad mission, I'm not a fan of cutting off collecting at a specific date: consider how much easier and cheaper it is to collect items from 2000 now than it will be in 2050!

VI. PHYSICAL FACILITIES/SAFETY AND SECURITY:

2

Your description of use of the house is a bit confusing: you say you maintain the house "exactly as it would have looked in the early 1900s" but also describe a gallery of ever-changing exhibits on the second floor. The interpretation – or your description of it – is unclear. Security seems adequate, assuming that visitors are always accompanied by a guide (you mentioned self-guided tours earlier). You do not mention cleaning procedures that meet professional museum standards (not at all the same as routine house-cleaning). Your mention of "deep cleaning" on a regular basis is particularly troubling. I urge you to contact AAM, AASLH, or a state or regional museum association for guidance and technical information on this. Again, you do not mention any special qualifications in historic preservation for any of your inspectors, and whether the handicap ramp design was done in an historically sensitive manner

VII. STAFF

2

Dedication and enthusiasm are the most important attributes for a small museum staff, and you clearly have that. The unusual co-director arrangement seems to fit the capabilities of the two individuals involved. I am, however, concerned about an apparent lack of museum experience, and no mention of attempts to get training and information in critical museum-specific areas such as collections care and management. Frankly, other sections of your narrative reflect this shortcoming.

VIII. GOVERNANCE AND MANAGEMENT/FINANCIAL MANAGEMENT:

3

There is obviously a good relationship between board, staff, volunteers and members. Most by-laws stipulate that the general membership elects the board. You do not describe the Historical Foundation (on organizational chart) and its relationship to you. Easier said than done, but you should work toward raising more money through programs and fund-raisers, so that the substantial individual contributions from estates etc. could go toward an endowment, whose interest would help support your operations in perpetuity.

IX. SUPPORT

4

You seem to have good involvement from volunteers and community groups. You list no income from admissions: even a modest charge would generate \$3-5,000 per year, according to your attendance figures. Consider a strategic plan to increase support (business/corporate support has worked well for some), and try to begin developing an endowment. You need to build long-term stability.

X. Long Range Plan

3

You seem to be on the right track, but your answer is vague. Need a more detailed description of how the plan was formed and updated, who is involved, what its major components are, the timetable and how progress monitored.

Poor Comments

We have reprinted below actual comments from various review sheets submitted to IMLS. After the comment there is a brief explanation as to why the comment is a poor comment.

TOO BRIEF

Exhibitions: Score 5

“The exhibits appear to be well done and interesting. So why is the museum only open for 1200 hours with 1800 visitors.”

Issue: This comment is so brief it does not provide a clear explanation of how the reviewer determined the applicant was above average, nor is there information as to what could be improved. The comment about hours and visitors also brings confusion to applicant as to whether the review is mixing information regarding the “Audience” section in to this comment.

LACK OF CLARITY

Collections: Score 5

“Collection appears to be well thought out in geographical theme. Protected species comprise 12% of collection.”

Issue: From reading the comment one can not determine if 12% is a high number or low number of protected species and how this percentage affected the score.

IMPOSES PERSONAL AGENDA

Exhibitions: Score 2

“The narrative describes that planning for installation of the Museum’s new galleries includes the statement that there are only to be five galleries, and only about 15,000 square feet devoted to public exhibit space, and that only about 900 square feet will be for changing exhibits – an abysmally small space for such a large collection, and also limiting the museum’s ability to house any normal size traveling exhibits. This shows that exhibitions take an extremely low priority for this institution, displaying a distinct lack of interest in attracting public audiences. No improvement in the percentage of collections available on display (5%) came with expansion of new galleries.”

Issue: The writer of this comment spends significant space for his views on the new exhibition space in an expanded facility. There is no commentary on the current exhibits or how the plans for new spaces fit the mission and resources of the institutions. This is an example of a reviewer inserting a personal agenda that detracts from the specifics of the application being evaluated. Other inappropriate discussions we see in review sheets range from what a museum should or should not be collecting, how many board meetings must be held, or why a staff is too large.

TOO BRIEF

Staff: Score 4
 “Good staff and personnel policies”

Issue: The comment is too brief. There is no information in the comment that helps the applicant know what they are doing appropriately. The reviewer also provided no information to help the applicant understand what could be done to improve their operations in this section.

**SUMMARIZES
NARRATIVE**

Long Range Plan: Score 4
 “Current development and drafting of a new Long Range Plan. Recently adopted a mission statement.”

Issue: The reviewer has summarized information from the narrative. The applicant already knows what they wrote in the application, a reviewer does not need to summarize the narrative in the review sheet. Information regarding what was appropriate about this section and how the section could be improved would be more beneficial to the applicant.

**IMPOSES
PERSONAL
AGENDA**

Governance and Management/Financial Management: Score 6
 “Board and committee structures are well thought out and applied. The involvement of both with the staff and institutional development are vital and should be commended. I would recommend placing a separate deputy director in charge of collections and education, since this would most likely be a largely administrative position anyway. This would allow for the addition of an extra curator outlined in #7. The Registrar should not report to a curator. Registration should be essentially independent and report to an administrator. There are always conflicts between curator and registrars and this can be partly avoided by placing both (with equal standing) under an administrator. Financial practices conform to museum and accounting standards and the financial position of the museum appears sound.”

Issue: The reviewer seems more concerned about finding a way to restructure the staff to his way of operating, rather than what the museum is accomplishing with this organizational set up, and how well board and staff use their resources to meet the mission of the museum within their structure.

**EVALUATES
FORM C**

Support: Score 5
 “Considering the difficulty faced by governmental agencies in raising outside funds you have generated a high degree of interest. IMLS prevents me from deducting for valuation of non-cash support, but most of your valuations for volunteer services are wildly overpriced. I know of no step-on guides on the eastern seaboard who make \$31.25/hr or even half that, the prices for educational interpreters are similarly overdrawn.”

Issue: The reviewer states in his comment that he should not be discussing the values for non-cash contributions, yet he then does so for several lines. The issue really is not the specific monetary value of the contributions, but how well are the contributions used to forward the mission of the museum. IMLS staff reviews the valuations of Form C, and if any appear unusual, we will ask the applicant for justification before we make a grant award involving that amount.

**INAPPROPRIATE
USE OF
QUESTIONS**
Long Range Plans: Score 3

“Shouldn’t curatorial agenda drive the plan? No acquisitions planned? Where’s expansion? Long Range Plan seems a bit disorderly – I can’t tell what you really intend to do and how?”

Issue: This comment is just a series of questions and is neither constructive in its tone nor substance.

**INAPPROPRIATE
TONE**
Staff: Score 6

“Considerable funds are provided through few sources. Why are businesses and corporations not sought out for sponsoring exhibitions, educational programs, or special projects falling within the general operating budget? This continues in so many ways to be too campus bound to be visitor friendly! It is though you work and live in your own world. Reach out and get the residents beyond the campus partners involved!”

Issue: In the last half of the comment the reviewer is trying to get the museum to expand, but while the intent of the reviewer may have been motivational, they come across in a rather derogatory tone. Other comments that might seem light or humorous to the writer may not be perceived as such by the applicant. Often times these comments give the impression that the reviewer was not serious in the analysis of the applications, but rather just looking to make a point for humorous purposes only. A friendly and helpful tone to your comments will help ensure that the applicant will perceive your reviews in a positive perspective even when high scores might not be given.

**PRIOR/OUTSIDE
KNOWLEDGE**
Exhibitions: Score 3

“Having seen the Historical Society Museum recently, I have found the description herein was extremely generous; it was not strong overall. The temporary exhibits, however, have been good, although their use beyond the one-time presentation could be better.”

Issue: The reviewer used personal knowledge. Comments should be based only on information obtained from the narrative you received. Past personal visits, hearsay, and websites are NOT to be used for evaluation. If you have prior or outside knowledge of an institution you may have a conflict of interest and you should call IMLS.

**INCOMPLETE
APPLICATION**
Staff: Score 4

“Small (but sounds like hard working) professional staff. Museum policies encourage professional growth. (This did not affect my score, however, I did not have a copy of the organizational chart in my grant. This left some items unclear to me.)”

Issue: IMLS will gladly send you any missing item from an application. Please review the Application Completeness section on page 7 of the handbook. Additionally, the reviewer comments that some items were unclear, yet his score was unaffected. This is a confusing comment for the applicant.

**COMMENT
DOES NOT
MATCH
SCORE**

Governance & Management/Financial Management: Score 4

“Board/staff relationships are clear. The museum is in good financial shape. You are to be commended for placing revenue in endowment. Good plans for diversification.”

Issue: The comment is full of very positive adjectives: good, commended, and good. The tone of the comment implies the applicant is doing better than average, yet the numerical score is 4. This is a case where the comments are not congruent with score.

**INAPPROPRIATE
ANALYSIS
OF
TECHNOLOGY**

Audience: Score 5

“Outreach activities are aggressive and laudable. The posting of a web page is a good move, but web hits are not the same as visits to the museum. You say nothing about the nature of these hits – have you posted lessons for area teachers? Is it possible to make a “virtual visit” to the museum? How do you control the quality of the hits, the way a visit to the museum can be controlled with educational programming? According to the statistics actual visits to your facility appear to be down in 1999 and 1998. International cooperation is also laudable.”

Issue: The reviewer here provides significant commentary about the use of the web site. Museums are developing web sites that have a variety of goals and purposes. As a reviewer, you must recognize the museum’s purpose for the web page and use that purpose as the basis for your evaluation. It is not clear from this comment if the reviewer fully understands the role of the web page within this museum’s operations. The comments suggest a variety of uses for a web site. It is not clear if the comments are analysis based on the current intent of the web site, if they are suggestions for future goals for web pages.

**EVALUATES
USE OF
GOS FUNDS**

Long Range Plans: Score 3

“Confused about relation among 1995 Museum Committee report, 1996 task force report, and 1999 long-range goals report. Were the earlier reports assessments or actual goal-oriented plans? If plans, what were the specific recommendations and timetables? No information on how the 1999 plan developed, in sense of whether interviewees were involved, what roles participants played, or how museum activities were evaluated. 1999 Plan goals described in good detail, but no steps towards achievement proposed, or timetable for implementation, or methods for staff review of progress described. Use of GOS funds generally enhance educational good goal, but no specifics provided to allow evaluation of this intent.”

Issue: It is not the responsibility of the reviewer to evaluate how the museum will spend GOS grant funds. This is not a project grant, and so the use of funds is not part of the evaluation criteria. It is administrative oversight role of IMLS to ensure the grant funds are spent properly.

GOS Scoring Definitions

SCORE	DEFINITION
1	Applicant's response demonstrates unsatisfactory performance when measured against generally accepted professional practices in this area of services/operations.
2	Applicant's response demonstrates some effort to follow generally accepted professional practices in this area of services/operations, but indicates a need for considerable improvement.
3	Applicant's response demonstrates a considerable effort to follow generally accepted professional practices in this area of services/operations, but indicates the need for some improvement.
4	Applicant's response demonstrates that its performance of this service/operation follows generally accepted professional practices, but does not indicate any additional merit.
5	Applicant's response demonstrates that its performance of this service/operation follows generally accepted professional practices, and indicates some additional merit.
6	Applicant's response demonstrates that its performance of this service/operation follows generally accepted professional practices and indicates considerable additional merit.
7	Applicant's response demonstrates leadership in this area of services/operations when measured against generally accepted professional practices.

IMPORTANT

- Assign *whole numbers only* to each of the ten (nine) narrative responses.
- *Do not* use fractions, decimals, zeros or more than one number in scoring individual sections.
- Score *all* responses; *do not leave any blank*.

FOUR-WEEK SCHEDULE OF COMPLETION

	WEEK 1	WEEK 2	WEEK 3	WEEK 4
ACTIVITY 1	Check box for all materials: read contract—call if problems; check each application for completeness			
ACTIVITY 2		Read: <i>Reviewer Handbook, GOS Application and Guidelines</i> booklet		
ACTIVITY 3		Evaluation of applications: 1st read to develop feel for range of responses		
ACTIVITY 4			2nd read —thorough—write comments and assign scores	
ACTIVITY 5			Review comments and scores; adjust as necessary	
ACTIVITY 6				Return Application Review Sheets
ACTIVITY 7				Complete and return Reviewer Questionnaire
ACTIVITY 8				Keep applications & your copies of review sheets until October 1, and then destroy

APPLICANT _____ **LOG NUMBER IG-**_____

I. AUDIENCE

SCORE

II. COLLECTIONS (Check here is applicant is non-collecting _____ If checked, do not give score or comment)

III. EXHIBITIONS

IV. MANAGEMENT & CARE Collections/Exhibits (Circle which section was answered by applicant)

V. EDUCATION

VI. PHYSICAL FACILITIES/SAFETY AND SECURITY

VII. STAFF

VIII. GOVERNANCE AND MANAGEMENT/FINANCIAL MANAGEMENT

IX. SUPPORT

X. LONG RANGE PLANS

SECTION II: GOS APPLICATION REVIEW SHEET

APPLICANT _____ LOG NUMBER IG-_____

This section is to provide the applicant with general feedback on their institution and application. Comments provided in this section are not scored and will not affect the funding status.

Average Score _____
calculated by reviewer

Standardized Score _____
calculated by IMLS

SECTION I: GOS APPLICATION REVIEW SHEET

APPLICANT _____ LOG NUMBER IG- _____

I. AUDIENCE

SCORE

II. COLLECTIONS (Check here is applicant is non-collecting _____ If checked, do not give score or comment)

III. EXHIBITIONS

IV. MANAGEMENT & CARE Collections/Exhibits (Circle which section was answered by applicant)

V. EDUCATION

VI. PHYSICAL FACILITIES/SAFETY AND SECURITY

VII. STAFF

VIII. GOVERNANCE AND MANAGEMENT/FINANCIAL MANAGEMENT

IX. SUPPORT

X. LONG RANGE PLANS

SECTION II: GOS APPLICATION REVIEW SHEET

APPLICANT _____ **LOG NUMBER IG-**_____

This section is to provide the applicant with general feedback on their institution and application. Comments provided in this section are not scored and will not affect the funding status.

Average Score _____
calculated by reviewer

Standardized Score _____
calculated by IMLS

I have reviewed the application cited above in compliance with the application review procedures. I have provided comments and scores (1 through 7) for all ten (or none for non-collecting) narrative sections.

Signature _____ Date _____

Attach Reviewer Identification Label Here

REMINDERS— FOR REVIEWING GOS APPLICATIONS

WHEN WRITING COMMENTS...

DO

- carefully follow IMLS guidelines and instructions
- consider the level of resources available to achieve the level of services described
- consider the museum's statement of purpose when evaluating it
- measure each institution against generally accepted practices of professional museum management
- remember that non-collecting museums are eligible for GOS funds
- recognize strengths and weaknesses
- address the applicant—not IMLS staff
- employ tact and discretion
- provide clear, concise statements
- type your review sheets

DO N'T

- use prior knowledge of an institution when evaluating it
- be sarcastic or condescending
- just ask questions—make direct statements whenever possible
- simply paraphrase or reiterate what an applicant has written
- penalize a museum for not collecting
- repeat your comments from section I when completing section II of the review sheet—use the latter section for general remarks only

WHEN SELECTING SCORES...

DO

- start with "4"
- pick a score that corresponds to your written comments
- score all responses—do not leave blanks

DO N'T

- give all high or all low scores
- use a decimal, fraction or zero or assign more than one number to the same response

DO RETURN YOUR REVIEW SHEETS ON TIME AND CALL IMLS IF YOU
HAVE ANY QUESTIONS:

(202) 606-8539